AGENCY MODULE

- ✓ Profile
- ✓ Aliases
- ✓ Contacts
- ✓ Governance
- ✓ Relationships

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Agency

Agency List

Overview: A new provider agency is created in the system by the WITS Administrator. This is the person assigned at the State level to manage the I-SMART system. Each new provider agency is created with minimal information about the name of the agency, display name, agency type, county, and address. One person at the provider agency will take the initial responsibility for being the agency administrator in the system. A login is created for this one agency administrator by the WITS Administrator. This login/User ID is the first entry point for the provider agency to access the system. Once the agency administrator gets the login he/she can then add and revise all information within the agency management modules including setting up all other staff and their access into the system.

1. To access the Agency Management modules of I-SMART click on **Agency** on the menu. You will see all the Agency Modules listed in the menu on the left and a list of the Agencies you have access to in the **Agency List** on the right which is usually only your own agency. On right is the WITS administrator's view of the Agency List.

    Note: Under the Agency List menu, the only required item to be completed is the Agency Profile along with the address. All other items in that menu are for the convenience of a provider agency and optional to the functioning of the system.

2. To edit the **Agency Profile** click on the Agency Profile menu item or click the **Review** hyperlink under **Actions** next to the appropriate agency.

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3. **Agency Name**, **Display Name**, **Agency Type**, **Agency State ID** and **County** are the required fields for the Agency Profile. This information will be populated by the WITS administrator in the process of creating your agency. However, you can change the information as appropriate to your agency.
Important Note: If you decide to change your agency name, be sure to notify the state WITS Administrator with the name change. That will allow the state to continue correctly tracking all state-required data.

4. The **Agency Name** is the name that will appear in the **LOC** field (which stands for Location) in the WITS banner at the top of every screen. This can be modified by the user.

5. The **Agency State ID** is a three digit number, is unique to each agency and will be assigned by the WITS Administrator.

6. All other information is optional and can be filledin by the agency administrator as necessary.

Note: All required fields are highlighted in yellow.

Agency

Agency Profile

6. To enter the address information for the agency click **Next** on the **Agency Profile** screen.

7. You will see the **Addresses** list screen. There will be at least one address documented there by the WITS administrator in the process of creating the agency.

8. Click on **Review** to edit the address that was created by the WITS administrator.

9. To add additional addresses, click the **Add Address** hyperlink.

10. Select the **Address Type** from the drop down list. Enter the **Address Line 1** and **2**, if needed, **City**, **Sate**, and **Zip Code**. Click **Save** to save this information.

11. You can enter another address or click **Finish** if you are done entering address information.

12. To add phone number information click the **Add Phone** hyperlink.

13. Adding a phone number uses the same process as adding an address. Select the phone number **Type** from the drop down list. Enter the phone number and extension, if needed, and click **Finish** to save the information.

Note: All required fields are highlighted in yellow.

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Aliases

14. This section keeps a historical record of all the names that the Agency has had since its inception in the system.

15. This list will remain blank if the name of the Agency has never been changed.

16. This list gets automatically filled anytime you edit or replace the name of the Agency in the Agency Profile screen. The previous name of the Agency before you made the change is maintained in this list.

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Contacts

17. Click on the **Contacts** menu item. This screen provides the listing of different contact people at the provider agency according to their functions and roles within the agency.

18. To add a new contact click the **Add Contact** hyperlink.

19. Select the **Staff**, **Contact Type**, and **Status** from the drop down list.

20. Enter the **Effective Date**.

21. Click **Save** to save the information. The information you entered will now appear in the List at the top of the screen.

22. If you are finished entering contact information click **Finish**.

23. To review or edit a previously entered contact click the **Review** hyperlink under **Actions**.

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Governance

24. The general purpose of the Governance menu item is to document your board membership information.

25. To add governance information click the **Add New Governance Record** hyperlink.

26. Enter the **First** and **Last Name** of the Governance/Board Member. Enter **Title**, **Federal Tax ID**, **Email**, **Start Date** and **End Date** as appropriate.

27. Select the appropriate response for **Gender**, **Role**, and **Board Member Type** from the drop down lists.

28. To add an **Address** for this record click the **Add Address** hyperlink. Select the **Address Type** from the drop down list. Enter the **Address Line 1** and **2**, if needed, **City**, **Sate**, and **Zip Code**. Click **Save** to save this information.

Note: All required fields are highlighted in yellow.

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Governance

29. To add a phone number for this record click the **Add Phone** hyperlink on the **Address** screen.

30. Select the phone number **Type** from the drop down list. Enter the phone number and extension if needed and click **Finish** to save the phone number information.

31. Once you complete this information and Save, this person's name gets added to the Governance list.

32. Click on the **Add New Governance Record** hyperlink for each new member to be added.

Note: All required fields are highlighted in yellow.

Agency

Relationships- Disclosure

The purpose of the agency level disclosure agreement is to be able to set up standard items for disclosure between agencies with which you work on a regular basis. A client consent is always needed in addition to the agency disclosure agreement. Once an agency disclosure agreement is created the information will serve as the default on the client consent screen. The client consent can be modified as needed in the client consent screen.

1. Click on the **Relationships** menu item and then click **Disclosure**.

2. You will see the **Agency Disclosure Domain List.**

3. To add a new disclosure agreement click the **Add Agency Disclosure Domain Record** hyperlink.

4. Select the **Disclosing** and **Receiving Agency** from the drop down. Disclosing agency is your own agency since you cannot setup policies for other agencies.

5. Answer the **Global Policy** and **Always Verify Consent** questions.
   - Global Policy: Will this set of rules apply to all agencies in the disclosure list? If not, the answer is No.
   - Always Verify Consent:: Must the clinician verify that a consent exists and has been signed by the client before making a referral? If so, the answer should be Yes.

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Agency

Relationships-
Disclosure

6. Select the **Consent Options** by holding down the CTRL key and clicking on the options. Then select the appropriate **Consent Expires Upon** choice and click the right pointing arrow. The information you selected will now appear in the **Selected Options** box.

7. Click **Finish** when you are done. This will take you back to the list screen and you will see the record you added on the list. To review or edit a record click the **Review** hyperlink under **Actions**.

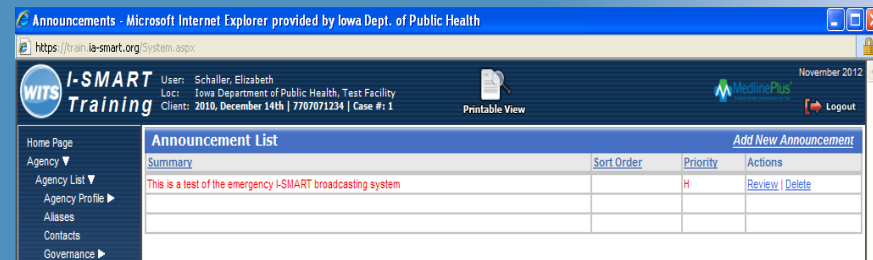# Agency

Sample Consent Screen

This is an example of what the client consent screen looks like. You will notice that there is a drop down for "Entities with Disclosure agreements". This is a list of your Agency Disclosure Agreements as defined in the previous slide.

Choosing one, causes the form to pre-populate with the conditions of the disclosure agreement. **It can be customized for this instance of the consent.**

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Announcements

1. Click the **Announcements** menu item. You will see the **Announcement List**. You can use this section to post or edit announcements on your home-page.

2. To add a new announcement click the **Add New Announcement** hyperlink.

3. Enter a summary of the announcement in the **Summary** field. This will appear on the **Announcements List** screen under the **Agency** module and on the **Announcements** screen of the **Home Page**.

4. Enter the **details** of the announcement, the **start date** and the **end date**. The **start** and **end date** will determine when the announcement is displayed on the **Home Page**.

5. Select the appropriate response for **Agency** (usually your own agency only) and **Priority** from the drop down list. **Leaving the Agency blank, causes the message to appear for all Agencies**.

6. The **Created By** and **Created Date** will be filled by the system and are read only fields.

7. Click **Finish** when you have entered all of the appropriate information for the announcement. This will take you back to the list screen and you will see the announcement you entered listed.

8. To review the details of an announcement or to edit an announcement you created click the **Review** hyperlink under **Actions** next to the appropriate announcement.

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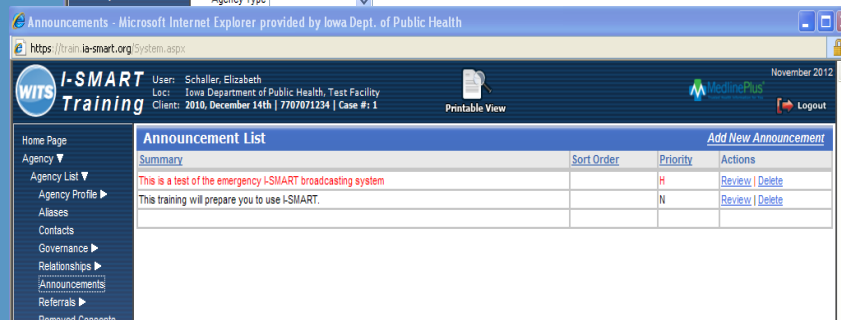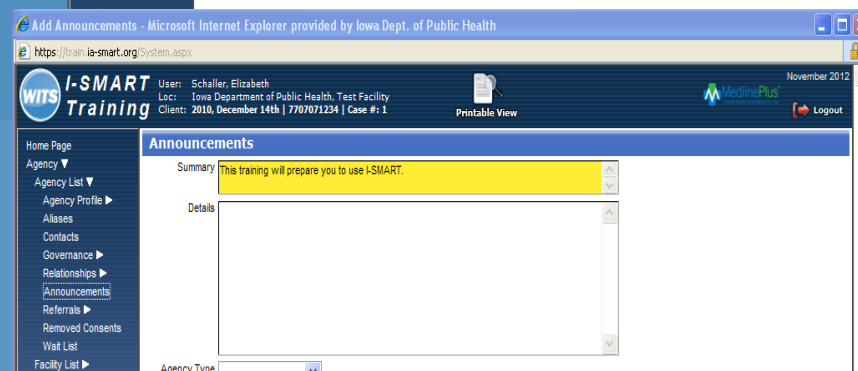
Agency-Referrals

Referrals In

1. To review a list of clients who have been referred to your agency click on **Referrals** and then **Referrals In**.

2. A list of all clients who have been referred to your agency will appear. To review the more detailed information for a particular referral click the **Review** hyperlink under **Actions**.

Agency-Referrals

Referrals Out

1. To review a list of clients who have been referred to other agencies by your agency click on **Referrals** and then **Referrals Out**.

2. A list of all clients who have been referred by your agency will appear. To review the more detailed information for a particular referral click the **Review** hyperlink under **Actions**.

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Agency - Waitlist

Wait List

1. To review a list of clients on the **Wait List** for your agency click **Wait List.**

2. A list of all clients on the **Wait List** for your agency will appear. The list can be sorted by any of the column headings by clicking on the column heading.

3. To review the details of a particular record click the **Review** hyperlink under **Actions**.